Standard on Public Relations

Approved July 2001

International Association of Assessing Officers

This standard revises and replaces the 1988 Standard on Public Relations.

The assessment standards set forth herein represent a consensus in the assessing profession and have been adopted by the Executive Board of the International Association of Assessing Officers. The objective of these standards is to provide a systematic means by which concerned assessing officers can improve and standardize the operation of their offices. The standards presented here are advisory in nature and the use of, or compliance with, such standards is purely voluntary. If any portion of these standards is found to be in conflict with the *Uniform Standards of Professional Appraisal Practice* (*USPAP*) or state laws, *USPAP* and state laws shall govern.

Acknowledgments

At the time of the completion of this standard, the Technical Standards Subcommittee was composed of Steve D. Pruitt, chair; James L. Pence; Nancy C. Tomberlin; Jan Vann; Randall C. Scott; and Edward Crane, associate member.

This standard also benefited from the recommendations and thorough reviews of many IAAO members. In particular, the subcommittee would like to thank Eric Cawley; Peter L. Davis; Alan S. Dornfest, AAS; Robert A. Hoffman; Marion Johnson, CAE; Wayne Llewellyn, CAE; R. Scot McAlpine; Rick Stuart, CAE; Kenneth C. Uhrich; Joan Young, RES; and Patrick T. Shields.

Published by
International Association of Assessing Officers
130 East Randolph
Suite 850
Chicago, IL 60601-6217

312/819-6100
Fax: 312/819-6149
http://www.iaao.org

ISBN 0–88329–169–X

Library of Congress Catalog Card Number:

Printed in the United States of America

Contents

Standard on Public Relations

1. Scope

This standard has been designed to make assessing officers aware of the growing need for good public relations and to promote effective communications between the assessing office and the public. Defining public relations with respect to the assessment profession and using terms specific to the assessment field, this standard discusses the need for a well-planned and well-executed communications program and provides recommendations on how to improve communication with the public by using proven marketing techniques and tools.

2. Introduction

2.1 Necessity for Public Relations

A public relations program in the assessment profession provides current and useful information on assessment policies and operations, as well as a means of responding to public opinion. A proactive public relations program is essential to increase public awareness of the assessment process and of the importance of the property tax in funding government. A public relations program should, therefore, be an integral part of every assessing office's work. The public needs to understand what the office does as well as how, why, and for whom its services are performed. An effective public relations program results in more accurate and thorough coverage from the media and a better-informed constituency.

2.2 Core Constituencies

The assessing office needs to be aware of a wide variety of core constituencies. Each individual or group has special needs that require special attention and communications. These groups include property owners, civic and professional organizations, lending institutions, developers, attorneys, real estate appraisers and brokers, governmental agencies and policymakers, tax representatives, and the media.

2.3 The Components of a Public Relations Program

A public relations program consists of research, action planning, communication, and evaluation.

- Research should determine how the public perceives the policies, programs, and operations of the assessing office.
- An appropriate action plan based on research should be developed.
- Communications with the public should be positive and courteous and provide education on the issues.
- When possible, the most current forms of technology and means of distributing information about assessment functions, programs, and results should be used to increase the effectiveness of communication.
- The effects of communication efforts should be evaluated and improvements made as required.

3. Developing the Public Relations Program

A written plan is necessary for an effective public relations program. The public relations program should be designed to give special attention to current social, economic, and political conditions. The program should also be tailored to meet the specific needs of core constituencies and address the role of the assessing agency.

3.1 Public Relations Officer

The assessing office should have a public relations officer to develop and coordinate its public relations program. Depending on circumstances, assessing officers can appoint a full-time public relations officer, assume the duties themselves, or assign them to another senior staff person.

Only the public relations officer should have authority to write and distribute news releases, newsletters, reports, and correspondence; coordinate special events such as open houses and public appearances; and edit special publications and annual reports.

3.2 Listening

The initial, and probably most difficult, task of a public relations program is to understand the public's current image of the department. This can be accomplished by listening to what the public is saying and observing its actions and reactions. Listening involves observing the uncontrollable variables (the economy, social trends, and the political environment), identifying possible problems or opportunities, interpreting public opinion, and evaluating the program. All issues that affect assessment functions must be clearly defined and given full attention.

Assessing offices should consider researching, testing, and implementing a public feedback mechanism. These systems, when effectively executed, provide assessing offices with a wealth of qualitative and quantitative data concerning operational effectiveness and areas demanding greater public emphasis. Effective feedback can be obtained from focus groups, citizen advisory committees, surveys, comment cards, website guestbooks, public speaking engagements, and "secret shoppers" (that is, persons who pose as customers and report on the treatment they receive).

3.3 Research

The assessing office needs to determine how its services are currently perceived to determine what actions must be taken to achieve the desired image. The assessing office may need to devote greater attention to marketing techniques, marketing tools, and current technology to accomplish the goals desired.

3.4 Issues Management and Action Planning

An organization manages its responses to an issue by anticipating emerging issues and shaping their development. To minimize adverse public reaction, the assessing officer should anticipate and plan for these emerging issues. For example, the impact of a future reassessment program can be predicted by statistical analysis, and a plan should be developed to deal with likely reactions. External conditions dictate what issues demand priority status. With proper planning, many problems can be avoided.

For any plan to be effective, an action timetable must be developed that defines tasks and establishes priorities for resolving the issues. Planning must be supported by upper-level management and be well coordinated. The assessing officer's approval is critical to the staff's acceptance and effective implementation of the plan.

3.4.1 Crisis Plan

The assessing office should have a written plan for handling crises. The plan should define roles within the assessing office. All personnel should know proper procedures. Guidelines to be followed need to be specific. A single spokesperson, the public relations officer, should deal with the news media in a crisis and be certain that all information released is accurate and precise.

3.4.2 Criticism

When faced with criticism, the following are recommended responses:

- Respond quickly, honestly, and openly.
- Do not use short-term solutions.
- Identify key constituencies and pay special attention to their views.
- Involve all staff from top management down.
- Prepare and preserve complete written documentation of the criticism and the solutions proposed or adopted.

3.5 Communications

Direct communication with constituents should be used to explain the role of the assessing office and the services it provides. There are many ways to communicate effectively, explain the assessing office's services, and clarify misconceptions or vague issues. Topics to be covered may include special tax exemption programs, the assessment process, the appeal process, the distribution of tax revenue, the tax rate, and reassessments.

The assessing officer should make use of all available media to communicate with constituents:

- Newspapers traditionally have been popular because of their large readership and low cost.
- Professional publications disseminate specialized information for targeted audiences.
- Brochures can be designed for very general or very specific purposes.
- Slide presentations and videotapes can be developed to present information to local civic organizations and to serve as a public information service available in the office, in public libraries, and in other public places.
- Local cable television public access channels can be used to provide information with visual appeal.
- Radio is especially useful for information that can be conveyed orally (such as a brief announcement informing citizens of upcoming dates for appeals and deadlines).
- Websites provide convenient access to information and records.
- Dedicated computers in assessing offices, other government offices, public libraries, and shopping malls also provide convenient access to information and records.
- Community centers and activities, such as senior centers and fairs, provide occasions to display exhibits, hand out materials, and answer questions.

When creating material for a public relations program, it is important to be concise, correct, compelling, clear, and colorful. The product put before the public should be carefully edited and proofed before distribution to the media. Unless statutes require that all government communications be in the country's official language, the office should consider carefully the issues of hiring multilingual staff and preparing materials in other languages when the jurisdiction has large populations not fluent in the official language.

Any communication with the public, whether written or oral, should be in plain language and should avoid professional jargon.

3.6 Review and Evaluation

The public relations program should be reviewed and evaluated to determine its results and effectiveness. Adjustments should be made as necessary; segments that have outlived their usefulness or are ineffective can be discontinued. Press clippings from newspapers, magazines, and trade publications provide evidence for reviewing and evaluating the public relations program.

4. Developing a Procedural Manual

Each employee's manner in serving the public is important to maintaining good public relations. Every public contact should be viewed as an opportunity to improve the organization's image. Procedural manuals that include a section detailing how staff should communicate with the public are critical for an effective public relations program. Because assessing offices differ in size, location, and nature, the procedural manual should be designed with the particular office in mind. Information on the following subjects should be included in the section on public relations:

- Professional standards adopted
- Important dates and deadlines
- Rules for disclosure of different types of information and confidentiality of data
- Guidelines for daily interactions with the public
- Suggestions for responding to irate taxpayers
- Guidelines for assessment hearings and appeals
- Staff appearance and attire
- Identification badges, nameplates, and vehicle identification
- Telephone etiquette
- Guidelines for the style and structure of letters and e-mail
- Documentation sheets for recording actions taken by the staff

5. Public Records

All records should be made available for public review unless access is specifically limited by law or unless confidential information is involved. Public access to assessment records is crucial to good public relations, and measures should be taken to ensure a climate of openness. Assessing office personnel must understand state or provincial statutes and local ordinances or charters pertaining to disclosure and confidentiality.

The assessing officer should establish guidelines for the dissemination of real estate records or taxpayer information and should be sensitive to privacy concerns. Although the emphasis must always be on serving the individual property owner or taxpayer first, a standard operating procedure addressing information requests from professionals in the real estate field (sales and appraisal), personal property field, and financial arena must be developed. A program for providing information via hardcopy reports (printouts, microfilm, or microfiche), magnetic media (magnetic tape, floppy disk, or CD-ROM), or electronic media (computer screen, website, or e-mail) should be developed.

6. Printed Information

In preparing printed materials and correspondence for the public, special attention should be paid to form, content, length, and language.

6.1 Correspondence

Written correspondence should follow specific guidelines:

- Answer letters promptly and within the provisions of the law.
- State information clearly using common words and phrases.
- Respond to all questions.
- Convey a professional image.
- Add a personal touch whenever appropriate.
- Correspond positively.
- Retain a copy of all correspondence for future reference.
- Be consistent with the office's style.

To avoid contradictory responses, correspondence addressing policy issues must cite controlling statutes or professional standards and be communicated within the assessing office. Responses to criticisms of an employee's behavior should avoid making comments about the employee but should address any unresolved problems of the correspondent.

6.2 Assessment Notices

Assessment notices must be mailed to every property owner or taxpayer according to legal requirements. Assessment notices should contain

- An explanation of what the notice is and what it means
- Owner's or taxpayer's name
- Mailing address
- Parcel identification number
- Legal description, if applicable
- Tax district information
- Effective date of the assessment
- Property address
- Exemptions, if applicable
- Total appraised value
- Statutory level of assessment
- Prior assessment
- Proposed or new assessment
- Net change in assessment
- Reason for new assessment
- Appeal rights, hearing procedures (informal and formal), and dates
- Date of notice
- Class or type of property

In addition, it is recommended that the notice include a tax impact statement showing projected real estate taxes for the upcoming tax year, based on existing budgets (or proposed budgets if available). References to truth in taxation or other statutes placing limits on budget or levies may be helpful.

6.3 Special-Purpose Messages

Special-purpose messages (for example, announcements of field inspection or appeal dates) should be developed and disseminated.

6.4 Forms and Questionnaires

Every assessing office should maintain a file of forms, questionnaires, and letters for recurring events. These can be maintained as hard copies or electronically on a computer network or intranet, or on the Internet, and include

- Appeal forms
- Exemption applications
- Income and expense questionnaires
- Sales questionnaires
- Correspondence on policy

Useful information can be obtained from carefully structured and designed questionnaires. Postage-paid return envelopes may increase the response rate.

6.5 Annual Reports

The assessing officer should prepare an annual report summarizing the activities and accomplishments of the assessing office. The annual report can be used to maintain a historical record of summary data relating to property valuation in the community, state, or province:

- Total number of parcels
- Total value
- Uses of property
- Types of property
- Exemption data
- Appeal data
- Ratio study analysis
- New construction
- Legislative changes

Such a report may also include information describing increased efficiencies in the operations, achievement of higher degrees of professionalism, and a listing of the standards and policies adopted in the valuation and administrative process.

7. Media Contact

7.1 News Releases

The news release is a valuable device that should be used to promote activities, communicate policies, and inform the public of issues relevant to the assessing office. The following are recommendations for writing a news release:

- Information should be newsworthy (timely, unique, or significant).
- The industry recommended format should be followed.
- The release should always arrive on time.
- The length should not exceed two pages.
- Information should be localized.
- The release should be proofread.
- The most important facts should appear first.
- Deadlines, editing procedures, and other requirements of the media should be accommodated.
- Office and clerical staff should be given copies of the release.
- Those mentioned in the release should be notified before it is sent.

The assessing office should maintain a list of media contacts. The list should be reviewed annually and include persons in all types of media.

7.2 Interviews and Conferences

Often, interviews and conferences will involve media professionals. The assessing officer or the spokesperson should be accurate, impartial, and avoid vague answers and comments off the record. If an answer to a particular question is not known, the response should be, "I will get back to you." An advance review of the questions is advisable whenever possible. Visual aids may be helpful.

7.3 Legal Notices

Legal notices of items such as assessment appeal hearings should be placed in newspapers of general circulation. State, provincial, or local regulations may specify print size, run time, and content requirements such as date, time, and location of hearing.

7.4 Public Service Announcements

Public service announcements should be sent to local newspapers and radio and television stations. Broadcast announcements should be brief; a twenty-five-word announcement takes about ten seconds of airtime. The dates the announcements are to be made should be specified, and the name of the public relations officer should be indicated for follow-up questions.

8. Speaking Engagements

Speaking engagements are an important opportunity for contact between the assessing officer and organized groups. Engagements can be spur-of-the-moment or scheduled. Material suitable for a variety of impromptu or formal speeches should be reviewed with appropriate staff members and rehearsed. Opportunities for speaking engagements are usually offered by service organizations, civic groups, neighborhood associations, boards of realtors, industry representatives, regularly scheduled public access stations or radio talk shows, legislators, and other elected officials. One opportune time to meet with groups is just before the mailing of assessment notices or a major reappraisal effort.

9. Contacts with Other Public Officials

An assessing officer must deal with other agencies and officials at all levels of government. An effective working relationship with these officials is crucial to efficient and effective office operations. To maintain good relations with other public officials, notify affected policymakers before making public announcements. Avoid unreasonable demands and public criticism of other departments.

10. Appeals Process

10.1 General Considerations

The appeals process affords the property owner or taxpayer an opportunity to have an assessment reviewed. During this process, as in all other situations, taxpayers should be treated with courtesy and respect. New information should be evaluated thoroughly and objectively.

See the IAAO *Standard on Assessment Appeal* (IAAO 2001) for detailed considerations on appeal procedures.

10.2 How to File an Appeal

A form and directions for filing an informal appeal should be included with the assessment notice or be easily available to the public. Taxpayers should also be informed of any associated filing fees and deadlines.

10.3 Rules of Evidence

Taxpayers should be made aware of the rules and procedures for an assessment appeal hearing. Information on what constitutes a valid appeal should be made available.

10.4 Notification and Recourse

An appellant should be quickly notified in writing of the decision concerning an assessment review. The petitioner should also be given forms for and information about the next level of appeal and pertinent deadlines.

10.5 Preparation for the Number of Appellants Expected

The assessing officer will need to determine the best method to accommodate the expected number of appellants, given the staff available. When a large number of appeals is expected, appointments, written appeals, additional phone lines, and computer terminals or a website for finding comparables and viewing property record forms may reduce waiting periods and improve responsiveness.

10.6 Facilities and Time Considerations

Adequate space and facilities should be made available for waiting appellants. The assessing officer should decide what constitutes a reasonable waiting period, and petitioners expected to wait longer than this time should be rescheduled. To afford each taxpayer an opportunity for review, rules for determining length of consultations should be established.

11. Public Education

The public needs to know why assessments are made and what is financed by property taxes. The taxpayer should be made aware that the assessment process is designed to establish a tax base and ensure that the tax burden is equitably distributed according to the assessed value of various properties. It should be emphasized that assessments can be made at various levels of government (local, state, or provincial) and are appealable at the same levels. Taxpayers should understand that they have a voice in the local budgetary process—they elect the officials who set the tax rates, can attend public hearings, and can vote on bonding or expenditure referendums. Taxpayers need to know the tax rate, how to apply it to the assessed value, and how to arrive at the tax bill. It is the assessor's responsibility to inform the taxpayer about the appraisal and assessment process, the information available for review, procedures for filing an appeal, and filing deadlines.

12. Internet Websites

The Internet is fast emerging as an effective way to inform the public. As the number of Internet users grows, the demand for relevant property tax information via the web grows accordingly. Thus, assessing officers would be wise to brainstorm, research, plan, and implement ways to deliver information on the Internet.

To be effective, websites demand continual emphasis on at least two key areas: content and style.

12.1 Website Content

Assessing office websites (which are composed of web pages) should be content-driven, so that information can be quickly accessed, retrieved, and reviewed. These websites can contain a virtual library of useful information, including

- A welcome page by the assessing officer
- Office hours and locations
- News releases
- Mission statement or strategic plan
- Job openings
- The appeals process
- An assessment notice explanation
- Exemptions
- Timetable
- Q&A page (also known as FAQs, or Frequently Asked Questions)
- Maps
- Property record, including ownership, property characteristics, sales history, and valuation
- A parcel's tax history
- Taxpayer forms
- A website map
- Links to other relevant websites

Simply placing information on the Internet is not enough. Websites should be programmed with the following tips in mind:

- Program web pages with appropriate keyword meta tags (special keywords that tell search engines about the page's content). Meta tags enable Internet researchers to find a particular type of property information in a specific jurisdiction quickly.
- Avoid "orphan" web pages, in which a web page has no means of returning the user to the main website. Always include a return link or menu of links back to the rest of your website.
- Use update information to let readers know how recently the content in the website was modified. Place this near the title or footer.
- Websites should be reviewed at least monthly to ensure content is kept up-to-date. If updating is required, the date should be noted on the web page itself.

- Include an e-mail link to the webmaster.
- If property information (owner information, characteristics, or taxation history) is provided, the information must comply with federal, state, or local privacy laws.

12.2 Website Style

In many cases, websites are designed with aesthetic appeal in mind. Consequently, designers sometimes go overboard on graphics and other special effects, thus slowing the page's ability to download quickly.
Those visiting assessing officers' websites are usually not interested in large, slow-downloading graphics or animations; they are interested mainly in content—information that can be quickly accessed and reviewed.

Other style guidelines include the following:

- Avoid dark text on dark backgrounds, and light text on light backgrounds. Keep contrast high. Unless there are other design considerations, use white backgrounds and black text. Red can be used for emphasis.
- Test a web page offline after it is constructed to ensure the page has a consistent appearance on a variety of platforms.
- Once the page is uploaded onto an Internet server, test the page from several ordinary home connections to confirm it is accessible and operational by taxpayers.
- If several photographs are displayed on a single web page, consider displaying the images as thumbnails.

Reference

International Association of Assessing Officers (IAAO). (July) 2001. *Standard on assessment appeal.* Chicago: IAAO.

Assessment Standards of the
International Association of Assessing Officers

Standard on Property Use Codes .... withdrawn

Standard on the Application of the Three Approaches to Value in Mass Appraisal .... September 1983
(revised August 1985)

Standard on Mass Appraisal of Real Property .... March 1984

Standard on Contracting for Assessment Services .... September 1986

Standard on Urban Land Valuation .... July 1987

Standard on Cadastral Maps and Parcel Identifiers .... January 1988

Guide to Assessment Administration Standards .... March 1990

Standard on Valuation of Personal Property .... February 1996

Standard on Facilities, Computers, Equipment, and Supplies .... May 1996

Standard on Property Tax Policy .... August 1997

Standard on Ratio Studies .... July 1999

Standard on Professional Development .... December 2000

Standard on Assessment Appeal .... July 2001

Standard on the Valuation of Property Affected by Environmental Contamination .... July 2001

Standard on Public Relations .... July 2001

Single copies of these standards can be obtained at a handling charge of $8.00 per standard from: IAAO, 135 South LaSalle Street, Department 1861, Chicago, IL 60674-1861.

IAAO members can receive these standards at a charge of $5.00 per standard or download them from www.iaao.org.

A complete set of standards is available for $50.00.